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NOVA SCOTIA
VOLUNTARY PLANNING BOARD

PLAN FOR THE AGRICULTURE SECTOR

JULY 1966

NOVA SCOTIA VOLUNTARY PLANNING BOARD

PLAN FOR THE AGRICULTURE SECTOR

July 1966

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The Chairman and Members
Nova Scotia Voluntary Planning Board

Gentlemen:

I have the honour to present to the Chairman and the members of the Nova Scotia Voluntary Planning Board the Agriculture Sector Plan for the planning period 1965 to 1968.

This current plan includes most of the same material earlier presented to your Board in the form of a sector report and target plan. It also includes, I am happy to state, the implementation action that has been taken in regard to our recommendations to date.

The general outlook for agriculture in Nova Scotia is quite favourable, provided a solution can be found for those factors contributing to a declining net income situation for farmers. We are optimistic that in the preparation of our submission for the Second Plan, we shall be able to isolate these elements and offer solutions.

Finally, let me assure you, Mr. Chairman, of our willingness to pursue and solve our difficulties, as well as our willingness to work toward achieving the target set by your Board for our sector.

Respectfully submitted,

S. H. Nichols

Stuart Nichols, Chairman
Agriculture Sector Committee

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CHAPTER I - INTRODUCTION

The agriculture sector was the first sector of the provincial economy organized as a part of the Voluntary Economic Planning program at Truro on December 11, 1962. For the purposes of the planning program, the sector was divided into five segments and committees were elected by those attending that organizational meeting. The five committees cover dairy, livestock, horticulture, field crops and poultry. Each committee was charged with the preparation of a target plan for its segment which would include:

(1) the recent and current rate of growth,

(2) the potential for increased growth and the economic obstacles which are preventing the attainment of a faster rate of growth,

(3) a target expressed in terms of an annual rate of growth, and

(4) the policies and programs necessary to achieve the target.

The Agriculture Sector Committee first met on September 6, 1963 to consider the segment plans for these committees. The sector committee submitted its overall report to the Voluntary Planning Board in November, 1964. This report contained a post-war review of sector developments and the recommendations approved by the sector committee. A further report containing the quantitative targets for the sector during the first planning period (1965 to 1968) was submitted to the Board later in that same year.

Included in the Board's "Report on Progress,

Overall Plan, Nova Scotia to 1968", was a twenty-page summary of the material contained in the sector report and the growth targets as selected by the Board for the sector.

The purpose of a further report at this time is to elaborate on the material contained in the Progress Report, to up-date the statistical material, to re-examine the targets in the light of current developments and to give the present status on the implementation of the recommendations.

The present report begins (Chapter II) with an economic review of the sector during the post-war period. In Chapter III, the potentials for growth are examined for the sector for the planning period. In Chapter IV, the quantitative targets for employment and value of output are presented and discussed, and in Chapter V, the recommended policies to achieve these targets are given as well as their current implementation status.

Finally, the Board's objective in publishing a separate sector plan for agriculture is to define more clearly the obstacles facing this sector during the planning period, what must be accomplished to remove these obstacles and what part the Board expects the sector to play in achieving its overall goals.

CHAPTER II - REVIEW OF AGRICULTURE SECTOR 1947 TO 1964

The following review of the economic developments in the agriculture sector at the farm level will be divided into two parts, the first pertaining to the structural changes that have occurred during the period, and the second to the trends in farm income.

Between 1951 and 1961 the total number of farms in the province declined from 23,815 to 12,518, or by 47.4 per cent (see Table A-1, Appendix for these and the following data quoted in this part). The major proportion of this decline, however, can be attributed to a change in the census definition of a farm between these two years. For example, on the basis of the 1951 definition the decline would have been from 23,815 to 18,264 (19.1 per cent), a less dramatic, but nevertheless significant statistic. For the purpose of this review it has been assumed that exclusion of these "farms" would little influence the more important developments that will be cited.

Over the same period the number of commercial farms, that is those farms with an annual value of products sold in excess of 1,200 dollars, also dropped from 6,570 to 4,939 (24.8 per cent), even though in 1961 this category made up a larger proportion of the total (39.4 per cent) than in 1951 (27.6 per cent).

As might be expected total land area included in farms also dropped in Nova Scotia from 3,173 thousand acres to 2,230 thousand acres. Total acreage also dropped for commercial farms, but the rate of decline (11.1 per cent) was somewhat less than that for

farms other than commercial (43.8 per cent). Land acreage per farm, commercial and other, did increase, though, and surprisingly at a greater rate for other farms than for commercial farms.[1]

Improved land acreage per farm has also increased at the same relative rate for each category over the period. In absolute terms, an average of 63 acres of improved land per commercial farm and 24 acres for other farms is still only about one-half of the comparative figures for the Province of Ontario.

Even though total capital value[2] in land, buildings, machinery and livestock declined between the two census years, capital value per farm in Nova Scotia increased sharply from 6,402 dollars to 11,630 dollars (81.7 per cent). The value of machinery and equipment, the only part of total capital value that could be isolated for the two economic size categories, increased at even a greater rate. The average increase per commercial farm was from 2,156 dollars to 4,098 dollars (90.1 per cent), and from 641 dollars per other farm to 1,320 dollars (105.9 per cent)[1]. As a matter of interest, in comparison to the Province of Ontario, the rate of increase for each of these categories was greater in Nova Scotia, (55.1 per cent and 62.2 per

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[1] In these comparisons it is apparent that the elimination of the 5,746 "farms" through a definitional change would influence the increase in per farm averages for those remaining in the other farms category.

[2] All value data used in this report are in current dollars because of a lack of reliable indices to remove price movements at the provincial level.

cent respectively in Ontario), even though absolutely Nova Scotia in 1961 still lagged behind Ontario in each category.

The total value of farm products sold increased by 20.6 per cent over the period from about 29 million dollars in 1950 to approximately 35 million dollars in 1960. As a group, commercial farm increases amounted to 39.3 per cent, while as a group other farms decreased by 45.4 per cent. On a per farm basis each group recorded increase from 3,445 dollars to 6,385 dollars (85.3 per cent) for commercial farms, and from 374 dollars to 464 dollars (24.1 per cent) for other farms. It is quite evident that the magnitude of the return from the sale of farm products, and especially the return to the other farms group, is indicative of the problems facing the farming community in Nova Scotia.

Generally, then, the statistical evidence gathered in the 1961 census indicates the transition taking place in the structure of primary farming in Nova Scotia since 1951; the number of farms decreasing along with a declining number of acres farmed, some improvement in improved land acreages, a dramatic increase in the use of machinery and other equipment, and corresponding increases in total value of products sold. Even though on the basis of this last statistic it is apparent that Nova Scotia farmers are improving their relative position, it is also evident that the low value of products sold per farm in the other farms category is one of the main problem areas in provincial agriculture in the sixties. In fact, if the value of products sold was given in "real" terms, that

is discounting price movements, and if this group in 1961 was on the same 1951 definitional base, average cash income per farm would be at a lower level than that recorded in 1950.

Cash income from the sale of farm products can be re-arranged into six groupings: horticulture, poultry products, field crops, livestock products, dairy products and forest products. Over the period 1947 to 1964 there have been some shifts in the relationship among these six categories (see Table A-2), but generally stated they have remained in the same order of importance, though increasing, throughout the period. Individually, farm cash income from the sale of poultry products approximately doubled between 1947 and 1964, and during the period actually reached higher peaks. Cash income from the sale of horticultural products remained more or less stable throughout the period, as did field crop sales, though in this latter instance an upswing is evident in the sixties. Cash income from livestock products increased by approximately 50 per cent, and income from dairy products increased by about one-third. The only group to decline over the period was the cash income from forestry products which fell by about one-half.

Total cash income rose from 32 million dollars in 1947 to about 44 million dollars in 1964 (38 per cent), even though the 1964 figure[3] was lower

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[3]The 1964 data are preliminary subject to adjustment upon publication of the 1965 figures by DBS. Therefore care should be exercised in placing too much emphasis on this apparent downswing.

than the levels attained during the first part of the decade. Also throughout the period there were some cyclical upswings and downswings with peaks in 1951, 1956 and 1963, and troughs in 1949 and 1952. Generally though, growth of farm cash income in terms of current dollars was more or less steady over the period.

While farm cash income has been increasing, farm net income[4] has been declining at an equally steady rate, (see Table A-3). In 1947, net income from farming operations was about 17 million dollars falling to a low of about 8 million dollars in 1964 (51.9 per cent). Discounting the 1964 figure until substantiated by the Dominion Bureau of Statistics (DBS), and relating the decline to the 1963 figure of about 12 million dollars, the resulting percentage drop of 31.1 is still significant.

On a per farm basis for the years 1951, 1956 and 1961, this means that net income per farm declined from 871 dollars to 818 dollars, and increased to 1,184 dollars. This is yet another significant statistic attesting to the "cost-price squeeze" that is seriously hampering primary agriculture in Nova Scotia.

Increasing operating and depreciation charges at a rate faster than increasing farm cash income, is quite evident from the statistical information. Between 1947 and 1964, these charges increased at a compound annual rate of 3.6 per cent, while over the

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[4]Farm net income is the sum of farm cash income, value of income in kind, supplementary payments and the value of change in inventories between year beginning and year end, minus operating and depreciation changes.

same period farm cash income increased at a compound annual rate of only 1.8 per cent. The end result of this difference is obvious in reference to the analysis in the first part of the chapter.

It has been estimated that the farm labour force has also dropped sharply in Nova Scotia even though in recent years the rate of decline has slowed appreciably, (see Table A-4). In 1947, it is estimated that the farm labour force numbered 24,000, declining to 11,400 in 1964 (52.5 per cent). The decline is, of course, coincident with the decline in the number of farms and the increased use of machinery and equipment.

A measure of labour productivity is the "value added by manufacture"[5] per man in farming operations. Indicated productivity, that is total "value added" divided by the number in the labour force, has increased over the period, although "real" productivity gains in constant dollar terms have probably been slight. In other words, even with the greater use of capital in the form of machinery and equipment, there has been no substantial gain in the indicated productivity of Nova Scotia's farm labour force over the range of the period.

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[5]"Value added by manufacture" in farming operations is the sum of cash receipts from the sale of farm products, the income in kind (exclusive of house rent) and the value of changes in inventory. Operating expenses (exclusive of taxes on all farm lands, net farm rent, depreciation, purchased services, wages to paid labour and interest mortgages and other debts) are deducted from gross farm income (less house rent) to give net value of production.

In summary then, the trend in total farm income over the period has been one of increasing farm cash income but diminishing farm net income due to a disproportionate rate of increase in farm operating and depreciation charges. Farm labour productivity, at the same time, has not been increasing at a rate fast enough to help overcome this "cost-price squeeze". The net effect is evident in the rapidly diminishing number of farms in Nova Scotia and the changing structure of the farming complex that remains.

Employment and value added by manufacture in the agricultural processing industries has been increasing steadily, if slowly, throughout the period. Proper analysis of this group of industries is hampered by the lack of consistent statistical information, that is, confidential requirements of DBS necessitate the grouping of a particular industry with another for some years in the period covered by this review. Also there have been several conceptual changes by DBS that result in a lack of continuity between various groups of years throughout the period.

Employment for all agricultural processing industries (see Table A-5) covered by statistical data has increased by the order of 500 from the beginning of the period to the mid-sixties. Value added, in like respect, has increased by about three times in current dollar terms.

Employment in the Fruit and Vegetable Canning and Processing Industry (see Table A-6) has varied somewhat over the period and has actually declined from the 1947 figure. The magnitude of the employment has been, though, fairly constant in the range of 450 to

600. Value added by manufacture has also remained fairly constant in the two million dollar range, even though in 1963, value added surpassed three million dollars for the first time in the period. In 1947 there were 24 firms in this industry, declining to 10 in 1963. Indications are then that the economic size of fruit and vegetable plants has increased and that this industry is more labour intensive in its operations than the group as a whole.

The Dairy Products Industry (see Table A-7) is composed of three DBS sub-categories: butter and cheese plants, other dairy product plants and pasteurizing plants. However, individual data are only available up to 1960, and in the case of pasteurizing plants data are only available for the four years 1957 to 1960, inclusive. These statistical difficulties preclude specific statements about the group. As a whole, both growth in employment and value added appear to have stabilized in the mid-sixties at about 1,300 and seven million dollars.

The same statistical difficulties are prevalent in the meat products industry (see Table A-8) as well as the two DBS sub-categories: slaughtering and meat packing industry, and sausage and sausage casing industry. The only feature which is evident from what statistical coverage there is, is that this industry group is a relatively minor employer.

Growth is evident in the feed manufacturing industry (see Table A-9) in Nova Scotia, even though the magnitude of employment is low, as is value added. Between 1949 and 1963, employment about doubled, while over the same period value added has increased from

about 200 thousand dollars to about 1.5 million dollars.

CHAPTER III - POTENTIALS FOR GROWTH

The main problem facing farming in Nova Scotia is the huge income disparity between the majority of those engaged in agriculture and those in other occupations. If the targets given in the following chapter are to be realized, then an equally huge effort must be put forward by all those directly or indirectly concerned with this sector, from within or without the province.

Consideration must be given by those in the planning program to the type of policies that should be set up to assist farmers in solving this income problem and on what basis they should be applied. For example, should policies be extended to all regardless of the viability of certain farm units, should they be extended on the basis of economic size groups, should they apply to farmers in certain areas of the province, or should they apply on the basis of some other criterion. And before such consideration is given, attempts should be made by those professionals in the Nova Scotia Department of Agriculture and Marketing, and elsewhere, to prepare a series of proposals on the way this income disparity problem might be met.

It would, however, be unrealistic to believe that the income problem of farmers will be or should be completely solved within the agriculture sector. In line with the general strategy of the Voluntary Planning Board, jobs will have to be created in other sectors for some of those now in agriculture.

As far as production orientation is concerned, there seems to be considerable confusion as to those

products which Nova Scotia farmers should produce and in what quantities. Or more specifically, which of the present array of products can continue to be produced with comparative advantage.

Due to regional transportation advantages, fluid milk producers have a more or less captive market. This market can be expected to grow as provincial population increases, but additional uses for milk production should be assessed, and a careful watch must be exercised on the possible impact of transportation innovations.

Increased production of fruit and vegetables is a more vulnerable proposition than milk production. Such growth in demand at the farm level is a resultant not only of increases in consumer demand for fresh produce, but also of processing industry demand. A successful competitive position for this industry is a factor that will undoubtedly influence production at the farm level.

There is little evidence that farmers can greatly expand the production of field crops for cash income, even though as was pointed out in the last chapter, some increase was evident in the mid-sixties.

The production of livestock is by far the most significant area for improvement, as in recent years provincial production of red meats has fallen short of provincial demand by in excess of 40 million pounds. Economic studies are needed to carefully assess what part of this deficiency can economically be satisfied and what policies are needed to ensure its production.

Poultry products production has already

entered a period of concentrated competition from external production, and the future outlook for this industry will require continued improvements in all production and marketing methods to meet competition.

On the whole, there seems to be little evidence to support the notion that sufficient analysis has yet been done to give Nova Scotia's farmers help in their crop and product production to assist them in taking full advantage of their location and competitive position. Another responsibility for those in the planning program, then, is to solicit expert advice on production, and based on this advice, give guidance to the farming community in the province.

Since 1947 there has been a steady, though unspectacular, growth in employment and value added by the agricultural food processing industry in Nova Scotia. This rate of growth may be expected to continue through the first and second planning periods.

The overall outlook for agriculture in Nova Scotia is overshadowed by the income problem at the farm level. In relation to this problem, all others are minor and upon a successful solution to this problem rests the growth potential for the entire sector.

CHAPTER IV - SECTOR TARGETS 1965 TO 1968

The Voluntary Planning Board has selected from several sets of projections given to it by the Agriculture Sector Committee a particular set[1] which is to be regarded as the sector targets for the First Plan period (1965 to 1968). These targets are:

	1968 Target $ Current	± % Change Over 1963/64 Base Years
A. Farm Cash Income		
Horticulture	6,700,000	+ 16.5
Field Crops	920,000	+ 10.7
Livestock	14,000,000	+ 8.9
Dairy Products	13,300,000	+ 12.1
Poultry Products	11,900,000	+ 6.9
Forest Products	3,400,000	+ 28.6
Totals	50,220,000	+ 12.4
B. Value Added by Manufacture		
Farming Operations	21,000,000	- 5.3
Agricultural Processing Industries	14,800,000	+ 21.8
C. Employment		
Farm Labour Force	10,600	- 13.4
Agricultural Processing Industries Employment	2,300	+ 16.2

Note: Complete data are given for the above in Tables A-10, A-11, and A-12.

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[1]These targets vary somewhat from those contained in the "Report on Progress, Overall Plan, Nova Scotia to 1968", published in 1965 by the Nova Scotia Voluntary Planning Board. The present targets were derived on the basis of the same assumptions utilized in the preparation of the previous ones, but have been updated to include more recent statistical information. Also, a target for farm cash income from the sale of forest products and a value added by manufacture target for farming operations has been added.

The target for horticultural products is related to the expected increase in the backward demand by the fruit and vegetable processing industry for these products. In addition to increased demand from processors, it is also expected that provincial demand for fresh horticultural products will also expand.

The increase in farm cash income derived from the sale of field crops is expected as a favourable result of the fertilizer assistance policy. This policy set up in 1965 by the Nova Scotia Department of Agriculture and Marketing is designed to assist in the increased production of forage crops and feed grains by farmers raising livestock. Undoubtedly the major part of the increase in physical quantities of field crop products will be consumed by livestock, but some improvement in cash sales is also expected.

Achievement of the target set for farm cash income from the sale of livestock products, though not spectacular in absolute monetary terms or relative to that income actually derived during the early sixties, will be, nevertheless, an ambitious undertaking. It was thought by the sector committee that successful implementation of the fertilizer subsidy policy and increased marketings as a result of the 1963-64 breed sow subsidy program was necessary to achieve this goal.

The dairy products target can be attained resulting in increased cash income from these products if the dairy products processing industry can profitably develop additional large uses for milk other than strictly fluid sales. Such an expansion also hinges on the feasibility of producing additional milk at the farm level for these processing purposes. The

fertilizer subsidy policy could assist farmers in expanding dairy cattle numbers by providing more and cheaper feed, and intensive study and technical assistance could well assist in the expansion of the milk market for dairy farmers.

The target for cash income from the sale of poultry products, is, though not significant in terms of increase in value, another goal that can only be attained by industry determination. The poultry meat and egg industry in Nova Scotia is built on the western feed grain transportation assistance policy of the Federal Government, as are other segments of provincial agriculture. Continuance of this policy is a basic necessity to the industry. Marketing problems are also besetting the poultry products industry, and if successful efforts are made to solve these problems, then the target should be surpassed.

The forest products target relates to the expected increase in demand that the expanding forest industries in the province will have for these products. This demand will be not only for the better quality wood products produced on farmers' woodlots, but also those wood products for which little previous market demand existed. The resultant will undoubtedly mean increased cash income from these products to farmers.

While total farm cash income is expected to rise over the planning period, "value added by manufacture" for farming operations is expected to decline slightly (5.3 per cent). The aforementioned disparity in the rates of increase of operating expenses and cash income is expected to continue and thus influence value added, at least during the first planning period.

The significant factor in the value added by manufacture target for the agricultural processing industries is the increase in demand for additional processing of food by the consumer. Linked to this factor is also population increase which should result in the attainment of the target set for that part of the agriculture sector. The main gains expected by those in the industry are in horticultural and livestock products.

That part of the provincial labour force engaged in farming operations is likely to decline further. It is expected that additional farms which are marginal will drop out and mechanization will increase on the remaining farms, resulting in yet lower labour requirements. The rate of decline is not expected, however, to be as great as was experienced in the fifties.

Some minor increase in employment in the agricultural processing industries is expected to correspond with the group's plan to achieve the value added goal, set for it by the Board.

Finally, the goals set for the entire agriculture sector could be attained during the period of the First Plan with determination on the part of the producers involved, and the successful carrying out of the subsidy programs recommended by the sector committee provided of course, that a determined effort is made to solve the farm income problem in Nova Scotia.

CHAPTER V - RECOMMENDATIONS

In this chapter the recommendations approved by both the Agriculture Sector Committee and the Voluntary Planning Board are given along with the action that has been initiated to date in their implementation. Following this group of recommendations will be another listing of those recommendations approved by the Agriculture Sector Committee, but not accepted by the Voluntary Planning Board for inclusion in the First Plan.

Recommendation Number 1 -
Fertilizer Assistance Policy

The Agriculture Sector Committee believes that cattle production, both dairy and beef, should be encouraged by the Nova Scotia Department of Agriculture and Marketing. The supply of Nova Scotia produced beef to meet market demands is deficient by 50,000 carcasses annually. Also the demand for meat is continuously increasing with greater emphasis towards leaner, rather than fatter meats, and it is suggested that the meat to supply this demand can be produced from Nova Scotia dairy animals bred to beef bulls. Further, such production programs along with greatly increased forage crops production will materially develop the livestock population, and give a fair return to efficient producers on such a program. Much progress has been made in improving quality through a system of grading and the payment of top market prices for these grades. Such system has been established through the Nova Scotia Co-Operative Abattoir.

In view of these above facts, the Agriculture

Sector Committee recommends:

That the Nova Scotia Department of Agriculture and Marketing should proceed to institute a policy for a defined period of assistance in suitable fertilizer for forage and grain crop production.

Action to Date

A fertilizer assistance program was made available to livestock producers in Nova Scotia during the year 1965. The basis of that year's program was additional usage of fertilizer by livestock producers on which a subsidy was paid.

In 1966, this program was expanded on the basis of a new criterion for the subsidy, that is on the number of animal units present on a livestock farm. The money outlay for the 1966 subsidy is expected to be 200 per cent greater than that of 1965.

Recommendation Number II -
Limestone Assistance Policies

The limestone assistance policies should be continued to encourage the production of top quality forage and grain.

Action to Date

The limestone transportation assistance policy has been promoted and encouraged by the Department of Agriculture and Marketing.

Recommendation Number III -
Soil Fertility Tests

The present excellent soil testing, soil management and crop production advisory services, as offered by the Nova Scotia Department of Agriculture and Marketing, should be expanded to provide even more information and assistance for Nova Scotia farmers in

planning their crop production programs.

Action to Date

New and modern laboratory instruments have been purchased for use in the provincial soil testing laboratory which will enable precise and analytical determinations on agricultural soils. Information is being accumulated from soil fertility experiments carried out in the province to develop more accurate fertilizer recommendations, based on the results of soil analyses. Farmers are encouraged to adopt a systematic soil testing program and, progressively, more farmers are using the soil testing service as a guide in planning their soil fertility programs.

Field crop demonstration plots are established in the various counties, each year, to encourage farmers to include higher quality field crops in their cropping program and to demonstrate the various practices and treatments necessary for optimum production of these crops.

During 1965 more field soil samples were received at the soil testing laboratory for analysis and fertilizer recommendations than during any previous year since the establishment of the laboratory.

Recommendation Number IV -
Hog Diseases

An extensive program should be initiated to rid, control or prevent severe diseases which are seriously affecting hog production.

Action to Date

The animal husbandry staff of the Department of Agriculture and Marketing have set up a Nova Scotia Swine Herd Health Program.

All of the purebred swine breeders in Nova Scotia have been enrolled in this program. They are visited four times yearly by an animal husbandry specialist and a provincial veterinarian. As a result of the program, the purebred breeders are carrying on a much better program of disease control than they did previously. Six Nova Scotia breeders have set up SPF units, purchasing their stock from breeders in the Province of Ontario. The results of the program to date indicate that the two most serious hog diseases - atrophic rhinitis and virus pneumonia - can be kept at a minimum.

Recommendation Number V -
Feed Freight Assistance Policy

A permanent feed freight-assistance policy should be established which would give the farmers of Nova Scotia coarse grains and other required supplements at a figure equal to prices in other parts of Eastern Canada for the same livestock requirements.

Action to Date

The feed grain freight assistance policy is currently being evaluated by the Agricultural Economics Research Council of Canada as to its effectiveness to the farmers of Eastern Canada. Nova Scotia Department of Agriculture and Marketing officials have been making efforts to ensure that a feed grain freight assistance policy which is effective at the federal level will also provide suitable price levels for Nova Scotia farmers.

Recommendation Number VI -
Registration of Packers and Truckers
of Horticultural Products

There should be registration of packers and truckers of horticultural products under the authority

of the Fruit and Vegetable Regulations of Nova Scotia.

Action to Date

Even though there have been several meetings held regarding the possibility of registering packers and truckers of horticultural products, nothing yet has been done to require such registration.

Recommendation Number VII -
Egg Marketing Board Study

A study should be conducted into the possibility of setting up a marketing plan, whereby the Montreal egg market shipments would not control the price received by Nova Scotia producers.

Action to Date

The Nova Scotia Poultry Council which includes those members of the Poultry Segment Committee has this recommendation under consideration.

Recommendation Number VIII -
Education*

During the months of May, June and September the instructors at the Nova Scotia Agricultural College should visit the high schools throughout the province and explain to senior students the opportunities of a farming career once sufficient training has been acquired in farming technology and in the principles of business management.

Action to Date

Instructors at the Nova Scotia Agricultural College have been carrying out regular programs of

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*Only the first part of a four part recommendation was accepted by the Voluntary Planning Board for inclusion in the First Plan.

school visitation in conjunction with career days which are held at the various high schools. In addition to this type of work done by the instructors, other agricultural personnel residing in districts adjacent to the high schools have been used in this school visitation program. This has been a particularly active program during the past year in the promotion of the vocational and technical college training program.

Recommendation Number IX -
Economic Research

The Nova Scotia Department of Agriculture and Marketing should be requested to form an Economics Division to work with existing divisions of the department and other research agencies, and with representative groups of farmers, processors and distributors, to conduct the necessary studies pertaining to the general aims as stated in the preamble, namely: the aims for economic planning for the agriculture sector should be to create a more prosperous agriculture. Some of the factors which are preventing the realization of these aims are:

(a) small average size of farm units;

(b) lack of technical knowledge and management skills on the part of present operators;

(c) lack of co-ordinated marketing policy, and

(d) lack of proper emphasis on maintaining soil fertility.

Action to Date

In May, 1966 an Economics Division was formed

within the Department of Agriculture and Marketing. This division at the present time will be initiating reserach studies affecting the efficient production of Nova Scotia agricultural products.

Recommendation Number X -
Farm Credit

(a) The Nova Scotia Department of Agriculture and Marketing should prepare a pamphlet clearly outlining all forms of credit presently available to farmers.

Action to Date

None to date, but a committee was formed within the department and assigned to prepare such a pamphlet within 1966.

(b) The facilities of the Nova Scotia Land Settlement Board and Farm Credit Corporation should be enlarged to include credit assistance to greenhouse operators, rather than have this continue under the jurisdiction of the Nova Scotia Department of Trade and Industry.

Action to Date

This recommendation has been carried out in 1966.

(c) Chartered banks should employ district field men to better supervise farm loans.

Action to Date

None.

(d) The Provincial Government should negotiate with federal authorities on the possibility of combining the efforts of long-term credit agencies under provincial jurisdiction while drawing funds from federal sources.

Action to Date

There has not been any formal movement on the part of the Provincial Government to carry out this recommendation.

Recommendation Number XI -
Swine

(a) A continued and expanded educational program should be carried out concerning all phases of the swine industry.

Action to Date

Recommendation has been carried out by the Department of Agriculture and Marketing.

(b) The premium or bonus policy should be continued on quality hogs.

Action to Date

The premium on Grade B hogs was dropped and in its place a transportation assistance policy was substituted by the Department of Agriculture and Marketing. The transportation policy was set up to equalize transportation rates from all parts of the province to the abattoir at Halifax.

Recommendation Number XII -
Apple Tree Planting Assistance Policy

A financial assistance program should be initiated to aid the apple industry in the planting of a minimum of one thousand additional acres of apple trees.

Action to Date

A financial assistance program was drawn up and received ratification by the executive and directors of the Nova Scotia Fruit Growers Association. However, when this general recommendation to provide assistance

in the development of apple orchards in the Annapolis Valley was presented to a general growers meeting, it was voted down. The program, then, has not been activated.

Recommendation Number XIII -
Industry Support

The five segment committees should remain active to give support to their recommendations, and to generate active support in their particular industry organizations for the program of Voluntary Economic Planning.

Action to Date

The segment committees within the agriculture sector have been meeting on a regular yearly basis. In the case of both the poultry and horticultural segments, more frequent meetings have been held.

Recommendations which were not accepted by the Voluntary Planning Board for inclusion in the First Plan were:

(a) Transportation assistance on packaged bees.

(b) Parts two, three, and four of the education recommendations which were:

(1) that the general policies of the Nova Scotia Agriculture College be revamped to encourage the entrance of students who have had some practical experience in farming and who intend to make a career of agriculture.

(2) that the facilities of the Nova Scotia Agricultural College be expanded to accommodate more students.

(3) that the Extension Division of the Nova Scotia Department of Agriculture be enlarged to provide additional guidance and information to existing farm managers.

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Table A-1. Principal Statistics, Farming Operations, Nova Scotia

	1951[1]	1956[1]	1961[2]	± % Change 1961 over 1951
1. Total Number of Farmers	23,815	21,075	12,518	- 47.4
2. Commercial Farmers[3]	6,570	N.A.	4,939	- 24.8
Per Cent Commercial Farms to Total	27.6		39.4	
3. Total Area of Farm Land (Acs.)*	3,173,691	2,775,642	2,230,395	- 29.7
(a) Total Commercial Farm Land Area (Acs.)	1,364,644	N.A.	1,213,141	- 11.1
(i) Land Area per Farm (Acs.)	208	N.A.	246	+ 18.3
(b) Total other Farms Area (Acs.)	1,809,047	N.A.	1,017,254	- 43.8
(i) Land Area per Farm (Acs.)	105	N.A.	134	+ 27.6
4. Total Improved Land[4] (Acs.)	661,975	629,874	497,521	- 24.8
(a) Total Commercial Farm Improved Land Area (Acs.)	330,966	N.A.	312,777	- 5.5
(i) Improved Land Area per Farm (Acs.)	50	N.A.	63	+ 26.0
(b) Other Farms Improved Land per Farm Area (Acs.)	19	N.A.	24	+ 26.3
5. Total Capital Value of Farms ($)	152,464,945	N.A.	145,588,800	- 4.5
(a) Capital Value per Farm ($)	6,402	N.A.	11,630	+ 81.7
(b) Total Value of Commercial Farm Machinery and Equipment ($)	14,162,882	N.A.	20,242,000	+ 42.9
(i) Value of Machinery and Equipment per Farm ($)	2,156	N.A.	4,098	+ 90.1
(c) Total Value of Other Farm Machinery and Equipment ($)	11,060,852	N.A.	10,010,100	- 9.5
(i) Value of Machinery and Equipment per Farm ($)	641	N.A.	1,320	+105.9

Table A-1 - (Concluded)

	1951[1]	1956[1]	1961[2]	± % Change 1961 over 1951
6. Total Value of Farm Products Sold[5] ($)	29,078,303	N.A.	35,054,770	+ 20.6
(a) Value of Products Sold, Commercial Farms ($)	22,635,021	N.A.	31,535,950	+ 39.3
(i) Value of Products Sold per Farm ($)	3,445	N.A.	6,385	+ 85.3
(b) Value of Products Sold, Other Farms ($)	6,443,282	N.A.	3,518,820	- 45.4
(i) Value of Products Sold per Farm ($)	374	N.A.	464	+ 24.1

Notes: (1) Farm defined as: (a) Three acres or more in size or, (b) from one to three acres in size with an annual value of agriculture products sold of 250 dollars or more.

(2) Farm defined as an agricultural holding of one acre or more with an annual value of products sold of 50 dollars or more. The resultant change in definition eliminated 5,746 farms in Nova Scotia that would have been included under the 1951 definition.

(3) Commercial farm is one (1961 definition) with an annual value of products sold in excess of 1,200 dollars. The 1951 data were re-calculated on the basis of the 1961 definition.

(4) Improved land includes: land under crops, improved pasture, summer fallow land, and others not specified improved land.

(5) Value of products sold is for 1950 and 1960, respectively.

* Acres

Sources: Census of Canada 1951 and 1961.

Table A-2. Farm Cash Income, Nova Scotia

	Poultry Products	Horticulture[1]	Field Crops	Livestock Products	Dairy Products	Forest Products	Totals
	(Thousands of Dollars)						
1947	5,210	4,516	552	8,190	9,348	4,461	32,277
1948	5,792	3,918	616	9,196	10,241	4,160	33,923
1949	5,466	3,930	621	8,002	10,199	3,666	31,884
1950	5,330	3,191	725	11,877	9,905	3,554	34,582
1951	7,792	2,850	702	13,510	10,555	4,826	40,235
1952	6,786	4,919	660	9,387	10,886	4,947	37,585
1953	8,829	3,578	661	8,923	11,829	4,267	38,087
1954	9,626	4,818	718	9,883	11,948	4,089	41,082
1955	9,714	3,673	654	9,144	12,006	4,948	40,139
1956	12,577	4,338	734	9,818	11,813	5,143	44,423
1957	11,301	4,205[2]	717	9,587	11,804	4,341	41,955
1958	12,033	3,902	672	9,631	12,084	3,416	41,738
1959	10,907	4,542	709	10,962	12,545	3,101	42,766
1960	11,259	4,849	716	10,872	12,401	2,882	43,004[3]
1961	11,232	5,782	755	12,308	12,747	2,672	45,498[3]
1962	10,989	5,489	771	13,825	12,330[2]	2,617	46,028[3]
1963	12,054	6,071	792	13,022	11,688	2,623	46,251[3]
1964 (prelim)	10,204	5,430	870	12,682	12,049	2,666	43,910[3]

(1) Include potato production.

(2) Due to change in coverage, data prior to this date not comparable.

(3) Totals are greater than the sum of the product totals due to the inclusion of deficiency payments for eggs under the Agricultural Stabilization Act.

Source: DBS 21-001, 21-502

Table A-3. Total Farm Net Income - Nova Scotia

	Cash Income[1]	Gross Income[2]	Operating and Depreciation Charges	Net Income[3]
	(Thousands of Dollars)			
1947	32,277	41,530	24,718	16,749
1948	33,923	44,469	25,746	18,723
1949	32,244	43,218	25,876	17,342
1950	34,582	44,774	26,660	18,114
1951	40,235	51,495	30,757	20,738
1952	37,585	51,239	32,494	18,745
1953	38,087	50,120	32,484	17,636
1954	41,082	51,198	33,249	17,949
1955	40,139	49,719	33,762	15,957
1956	44,423	54,262	37,017	17,245
1957	41,955	50,389	36,822	13,567
1958	41,738	51,477	36,376	15,101
1959	42,766	53,704	38,821	14,883
1960	43,004	53,686	38,645	15,041
1961	45,498	55,691	40,872	14,819
1962	46,028	54,541	42,295	12,246
1963	46,281	55,491	43,958	11,533
1964 (prelim.)	43,910	53,472	45,422	8,050

(1) Income from the sale of farm products.

(2) Income from the sale of farm products, value of income in kind, supplementary payments and value of changes in inventories between year beginning and year end.

(3) Including (2) above and deducting operating and depreciation charges.

Source: DBS 21-502, 21,202

Table A-4. Farm Labour Force, Value Added by Manufacture and Indicated Productivity, Farming Operations, Nova Scotia

	Farm Labour Force[1] (Number)	Value Added by Manufacture[2] ($'000)	Indicated Productivity $/Man
1947	24,000	24,740	1,031
1948	23,800	26,293	1,105
1949	23,700	25,003	1,055
1950	23,500	25,222	1,073
1951	23,300	28,931	1,242
1952	23,100	27,619	1,196
1953	22,700	27,342	1,204
1954	22,100	27,957	1,265
1955	21,300	25,957	1,219
1956	20,000	28,461	1,423
1957	18,000	26,948	1,497
1958	16,000	26,396	1,650
1959	14,400	26,674	1,852
1960	13,200	27,385	2,075
1961	12,000	27,530	2,294
1962	11,800	25,715	2,179
1963	11,700	23,600 (est.)	2,017
1964	11,400	20,700 (est.)	1,816

1. Estimated by V.E.P. Staff.

2. Is the sum of cash receipts from the sale of farm products, the income in kind (exclusive of house rent) and the value of changes in inventory. Operating expenses (exclusive of taxes on all farm land, net farm rent, depreciation, purchased services, wages to paid labour and interest on mortgages and other debt) are deducted from gross farm income (less house rent) to give net value of production.

Source: DBS 61-202

Table A-5. Employment and Value Added by Manufacture Totals, Agricultural Processing Industries, Nova Scotia

	Employment (Average Number)	Value Added by Manufacture ($ '000)
1947	1,582	4,560
1948	1,398	3,857
1949	1,232	4,059
1950	1,388	3,928
1951	1,340	4,329
1952	1,296	4,979
1953	1,415	5,857
1954	1,480	6,726
1955	1,469	6,224
1956	1,517	7,134
1957	1,982	9,005
1958	1,933	8,977
1959	1,932	9,799
	Revised Standard Industrial Classification	
1960	2,033	10,383
	Total Activity Concept	
1961	2,014	10,269
1962	2,075	9,448
1963	1,959	11,684
1964	N.A.	N.A.

Source: See Tables A-6 to A-9.

Note: The following are not included in the totals:
1. Fruit and Vegetable Canning and Processing Industry - 1964.
2. Dairy Products Industry (Milk Pasteurizing Plants) 1947 to 1957, inclusive.
3. Dairy Products Industry, totals - 1964.
4. Feed Manufacturers - 1947, 1948.
5. Meat Products Industry (Slaughtering and Meat Packing) - 1948, 1959, 1961, 1962, 1963, 1964.
6. Meat Products Industry (Sausage and Sausage Casing Industry) - 1947, 1961, 1962, 1963, 1964.

Table A-6. Fruit and Vegetable Canning and Processing Industry, Nova Scotia.

	No. of Establishments	Employment (Average Number)	Value Added by Manufacture ($ '000)
1947	24	927	1,989
1948	22	665	1,312
1949	17	418	1,152
1950	23	607	1,274
1951	21	517	1,066
1952	17	470	1,240
1953	16	432	1,649
1954	15	480	2,201
1955	17	470	1,424
1956	16	487	1,768
1957	17	588	2,029
1958	17	515	1,898
1959	20	531	2,378
	Revised Standard Industrial Classification		
1960	10	481	1,690
	Total Activity Concept		
1961	10	576	2,437
1962	10	606	1,827
1963	10	650	3,142
1964	N.A.	N.A.	N.A.

Source: DBS 31-204, 32-218, Various issues.

Table A-7. Dairy Products Industry, Nova Scotia

	Butter and Cheese Plants[1]			Other Dairy Product Plants[2]			Pasteurizing Plants[2]			Totals		
	No. of Est.	Employment (Average No.)	Value Added ($ '000)	No. of Est.	Employment (Average No.)	Value Added ($ '000)	No. of Est.	Employment (Average No.)	Value Added ($ '000)	No. of Est.	Employment (Average No.)	Value Added ($ '000)
1947	26	572	2,623	5	78	272	N.A.	N.A.	N.A.	31	650	2,895
1948	25	640	2,195	5	81	320	N.A.	N.A.	N.A.	30	721	2,515
1949	23	639	2,228	5	84	447	N.A.	N.A.	N.A.	28	723	2,675
1950	24	593	2,033	5	89	253	N.A.	N.A.	N.A.	29	682	2,286
1951	23	562	2,358	5	85	241	N.A.	N.A.	N.A.	28	647	2,599
1952	23	576	2,675	5	76	294	N.A.	N.A.	N.A.	28	652	2,970
1953	25	716	3,134	8	88	338	N.A.	N.A.	N.A.	33	804	3,472
1954	25	726	3,394	9	90	426	N.A.	N.A.	N.A.	34	816	3,819
1955	23	718	3,411	7	93	399	N.A.	N.A.	N.A.	30	811	3,810
1956	23	733	3,351	7	90	355	N.A.	N.A.	N.A.	30	823	3,706
1957	21	701	3,510	5[4]	61	269	29	414	2,020	55	1,176	5,800
1958	21	701	3,603	5[4]	61	301	30	453	1,839	56	1,215	5,743
1959	19	714	3,745	4[4]	98	269	30	465	2,152	53	1,237	6,166
					Revised Standard Industrial Classification							
1960	12	167	647	5	125	527	36	982	5,399	53	1,274	6,573
					Total Activity Concept							
1961	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	51	1,323	6,904
1962	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	48	1,356	6,705
1963	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	44	1,267	7,061
1964	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

(1) DBS classification but no cheese produced in Nova Scotia during period.
(2) Includes ice cream plants and condenseries.
(3) Milk pasteurizing considered a merchandizing activity prior to 1957.
(4) Does not include specialized ice cream firms.

Source: DBS 31-204, 32-209, various issues.

Table A-8. Meat Products Industry, Nova Scotia

	Slaughtering and Meat Packing Industry			Sausage and Sausage Casing Industry			Totals		
	No. of Est.	Employment (Average Number)	Value Added ($ '000)	No. of Est.	Employment (Average Number)	Value Added ($ '000)	No. of Est.	Employment (Average Number)	Value Added ($ '000)
1947	3	5	36	N.A.	N.A.	N.A.	3	5	36
1948	2	N.A.	N.A.	3	12	30	5	12	30
1949	2	N.A.	N.A.	3	N.A.	N.A.	5	17	50
1950	3	9	33	3	15	29	6	24	42
1951	5	63	178	4	19	46	9	82	224
1952	5	55	205	4	23	73	9	78	278
1953	5	61	157	4	22	72	9	83	229
1954	4	65	352	4	22	60	8	87	412
1955	4	61	189	4	22	68	8	83	257
1956	5	62	713	5	41	86	10	103	799
1957	4	60	263	5	49	151	9	109	414
1958	3	46	207	5	45	141	8	91	348
1959	2	N.A.	N.A.	5	48	127	7	48	127
				Revised Standard Industrial Classification					
1960	6	47	163	5	112	643	11	159	806
				Total Activity Concept					
1961	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
1962	4	N.A.	N.A.	4	N.A.	N.A.	N.A.	N.A.	N.A.
1963	4	N.A.	N.A.	3	N.A.	N.A.	N.A.	N.A.	N.A.
1964	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

Source: DBS 31-204, various issues.

Table A-9. Feed Manufacturers, Nova Scotia

	Number of Est.	Employment (Average Number)	Value Added by Manufacture ($ '000)
1947	N.A.	N.A.	N.A.
1948	N.A.	N.A.	N.A.
1949	11	74	182
1950	11	75	326
1951	15	94	440
1952	13	96	491
1953	13	96	507
1954	15	97	294
1955	15	98	733
1956	18	104	861
1957	18	109	762
1958	17	112	988
1959	15	116	1,122
	Revised Standard Industrial Classification		
1960	16	119	1,314
	Total Activity Concept		
1961	11	115	928
1962	11	114	916
1963	11	132	1,481
1964	N.A.	N.A.	N.A.

(1) Includes feed mills and prepared stock and poultry feeds industry.

Source: DBS 31-204, 32-214, various issues.

Table A-10. Cash Income and Value Added by Manufacture Targets,

Farming Operations, Nova Scotia

Year	Horticulture Value	± %	Field Crops Value	± %	Livestock Value	± %	Dairy Products Value	± %	Poultry Products Value	± %	Forest Products Value	± %	Totals Value	± %	Value Added Value	± %
							Historical									
1960	4,894		716		10,872		12,401		11,259		2,882		43,024		27,385	
1961	5,782	+19.2	755	+ 5.4	12,308	+13.2	12,747	+ 2.8	11,232	- 0.1	2,672	- 7.3	45,496	+ 5.7	27,530	+ 0.5
1962	5,489	- 5.1	771	+ 2.1	13,825	+12.3	12,330	- 3.3	10,989	- 2.2	2,617	- 2.1	46,021	+ 1.2	25,715	- 6.6
1963	6,071	+10.6	792	+ 2.7	13,022	- 5.8	11,688	- 6.0	12,054	+ 9.7	2,623	+ 0.3	45,458	- 1.2	23,600 (est)	- 8.2
1964	5,430	-10.1	870	+ 9.9	12,682	- 2.6	12,049	+ 3.1	10,204	-15.3	2,666	+ 1.6	43,901	- 3.4	20,700 (est)	-12.3
							Projections									
Short Range to 1968																
1965	6,100	+12.3	860	- 1.2	13,200	+ 4.1	12,400	+ 2.9	11,300	+10.7	2,900	+ 8.8	46,760	+ 6.5	22,400	+ 8.2
1966	6,300	+ 3.3	880	+ 2.3	13,500	+ 2.3	12,700	+ 2.4	11,500	+ 1.7	3,100	+ 6.7	47,980	+ 2.6	22,200	- 0.9
1967	6,500	+ 3.2	900	+ 1.1	13,700	+ 1.5	13,000	+ 2.4	11,700	+ 1.3	3,200	+ 3.2	49,000	+ 2.1	22,000	- 0.9
1968	6,700	+ 3.1	920	+ 2.2	14,000	+ 2.2	13,300	+ 2.3	11,900	+ 1.2	3,400	+ 6.2	50,220	+ 2.5	21,000	- 4.5
		(+16.5)		(+10.7)		(+ 8.9)		(+12.1)		(+ 6.9)		(+28.6)		(+12.4)		(- 5.3)
Medium Range to 1972																
1972	7,500	(+30.5)	1,000	(+20.4)	15,000	(+16.7)	14,500	(+22.2)	12,700	(+14.1)	4,000	(+51.2)	54,700	(+22.6)	18,500	(-16.5)

Note: Value is in thousands of current dollars.

± % is change over previous year.

(± %) is change over 1963/64 base years.

Table A-11. Value Added by Manufacture Targets, Agricultural Processing Industries, Nova Scotia

Year	Value Added ($ '000)	± %
	Historical	
1960	10,383(1)	
1961	10,269(2)	- 1.1
1962	9,448(2)	- 8.0
1963	11,684(2)	+23.7
1964	12,600 (est)	+ 7.8
	Projections	
Short Range to 1968		
1965	13,100	+ 4.0
1966	13,700	+ 4.6
1967	14,300	+ 4.4
1968	14,800	+ 4.2
		(+21.8)
Medium Range to 1972		
1972	17,000	(+40.0)

Note: ± % is change over previous year.

(± %) is change over 1963/64 base years.

1. Data on different base than following years, see Table A-5.
2. Meat products industry data not included.

Table A-12. Farm Labour Force and Agricultural Processing Industries Employment Targets, Nova Scotia

Year	Farm Labour Force Number	Farm Labour Force ± %	Agricultural Processing Industries Employment Number	Agricultural Processing Industries Employment ± %
		Historical		
1960	13,200 (est)		2,033(1)	
1961	12,000	- 9.1	2,014(2)	- 0.9
1962	11,800 (est)	- 1.7	2,075(2)	+ 3.0
1963	11,700 (est)	- 0.8	1,959(2)	- 5.6
1964	11,400 (est)	- 2.6	2,000 (est)	+ 2.1
		Projections		
Short Range to 1968				
1965	11,200	- 1.8	2,100	+ 5.0
1966	11,000	- 1.8	2,150	+ 2.4
1967	10,800	- 1.8	2,200	+ 2.3
1968	10,600	- 1.9	2,300	+ 4.5
		(- 8.2)		(+16.2)
Medium Range to 1972				
1972	10,000	(-13.4)	2,600	(+31.4)

Note: ± % is change over previous year.
(± %) is change over 1963/64 base years.

1. Data on different base than following years, see Table A-5.
2. Meat products industry data not included.